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ABSTRACT

This document contains presentations from four poster sessions at a conference on human resource development (HRD). "Human Resource and Organization Development Program Brochures: What Prospective Students Want" (Rose Opengart, Mary Wilson Callahan) reports on a study of promotional materials of graduate programs in the field of human resource and organization development that resulted in the following recommendations for brochure effectiveness: include abundant information on faculty and students; list specific courses available; indicate the availability of graduate assistantships; provide information on location of the university; and offer clear, concise, and easy-to-read material. "Web-Assisted Foreign Study Model" (James J. Kirk) depicts a foreign study instructional delivery model that combines marketing and delivery of international instruction with on-site visits in a foreign country. "Creating the Global Learning Organization (GLO)" (Gary N. McLean, Amy S. Tolbert, Ray C. Myers) is an action research model designed to assist United States-based corporations in creating an organizational culture that is globally inclusive in theory and practice at all levels. "Organizational Alignment Theory Updated: Poster Presentation" (Steven W. Semler) presents an overview of Semler's theory of organizational alignment, discussion of how and why it works, several theoretical propositions, a conceptual and diagnostic alignment model, and implications for practice. The papers contain reference sections. (MN)

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2000 AHRD Conference

Poster Sessions

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Raleigh-Durham, NC

March 8 - 12, 2000

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Human Resource and Organization Development Program Brochures: What Prospective Students Want

Rose Opengart
University of Georgia

Mary Wilson Callahan
WORK IN PROGRESS

Current students in the field of Human Resource and Organization Development analyzed marketing materials from eight graduate programs. Analysis was grounded in the fundamental elements of the marketing mix, including people, product, price, place, and promotion. Students examined brochures and made suggestions regarding effectiveness of presentation, content, and ability to attract students such as themselves. Recommendations for brochure effectiveness are presented in Poster 2.

Keywords: Marketing, Brochure, Graduate programs

The purpose of this study is to examine promotional materials of graduate programs in the field of Human Resource and Organization Development (HROD). The brochures will be analyzed for their effectiveness in describing a particular program and subsequent ability to attract students. Analysis of program brochures using a marketing perspective serves to determine marketing strategies, identify underlying philosophies and assumptions, and characterize the programs, their intended markets, and the products and services offered. Key themes emerging from assessments by various audiences is presented.

Marketing is an important business strategy and is applicable to many arenas. The need for marketing developed as the productive capacity of the United States began to exceed the immediate needs of society. The marketing manager must utilize and direct this excess productive capacity into channels people desire. This requires organizations to be consumer oriented and take direction from the marketplace. (Buskirk, 1970). This concept is as important to production oriented organizations as to those that provide service and education. A university is in competition with many others, and can use marketing strategy to its advantage. The use of the four P's (Product, Price, Place, and Promotion), enables an organization to gain a strategic advantage. Taken together, the P's constitute a mix often referred to as the marketing mix. The mix is the combination of marketing tools that a marketing manager attempts to arrange and control in order to create exchanges with target market members (Sandhusen, 1993). The idea is to come up with a mix that will clearly differentiate your product from those of your competitors in order to attract the desired consumers, or in this case, students.

This analysis is grounded in the fundamental elements of the marketing mix, in other words, the four P's. In this study, a fifth P was added to include the People dimension. For purposes of this study, these terms and their applications to HROD program brochures are defined below in Table 1.

Method

The researchers have gathered brochures from leading graduate programs in HRD, HROD, and OD. These eight schools were selected as a result of the recommendation by the Director of HROD programs at the University with which the authors are affiliated. These eight schools include: Benedictine University, Case Western University, Columbia University, University of Minnesota, University of Nebraska, University of Texas at Austin, Vanderbilt University, and Xavier University. The researchers performed the first level of analysis, that (1) examined each brochure along the five dimensions described above and (2) assessed the effectiveness of each brochure in terms of clarity, comprehensiveness, and persuasiveness.

The second step involved the presentation of the brochures to students attending classes in HROD. The students were given the definitions and applications of the five P's as presented above and asked to perform an

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examination and assessment along the same lines as the first level analysis. They were asked to analyze the brochures as well as provide opinions regarding effectiveness of materials, expectations raised by the materials, additional information and needs, etc. Their comments were gathered and analyzed (using qualitative content analysis) for key themes that emerged.

One limitation of the study was that classes were not in session prior to manuscript submission. Therefore, a modified sample was necessary. Three students in addition to the authors evaluated the brochures using the method described above. The resulting summary analysis is presented. The analysis at the conference will therefore be considerably more extensive and might differ somewhat from the initial analysis presented.

In the third level of analysis, the full set of information is summarized. This information contains the summary analysis and those elements that students stated as attractive and necessary features of program brochures. The posters displayed at the AHRD conference feature the HROD program brochures, highlighting how, on the whole, they address (or fail to address) the five P's. Additionally, key themes are summarized and presented. Specific examples of student critique and key themes in the brochures are highlighted. The figures presented below are miniature models of the posters and the summary analyses.

Table 1. Marketing Mix defined

Dimension	Definition	Application
People	The interests, needs, priorities, and resources of the stakeholders in the economic transaction, including your own organization, customers/clients, suppliers, competitors, regulators, and opinion leaders	Examine information regarding the faculty, staff, students, and alumni and their qualifications, diversity, interests and experience.
Product	The issues surrounding the development of the product or service. Major concerns are identification of need in the marketplace and appropriate response to the identified need.	Examine the details of the program offering. This could include the department in which the program is located, the curriculum, availability and frequency of courses, reputation of institution, and anything unique to the particular program.
Price	Finds where market demand, typically expressed as dollars, and the cost of producing the product or service come together and determines the profitability or lack of it. Competitive positioning keeps pricing from being a simple matter.	Determine the equitability of the cost of the program and the overall value. Determine availability of graduate assistantships.
Place	The task of getting the goods to market and/or delivering the service. Distribution is more descriptive of the task, but it is not so conveniently memorable as place.	Analyze the brochure for the quantity, depth, and quality of the description of the location of the university. Determine availability of distance learning and satellite locations.
Promotion	All of the methods of communicating the product offering to the target market.	Analyze general appearance, presentation, and promotional style. Look for evidence of alternative ways of promoting the program.

Significance

It is important to understand marketplace needs in order to develop marketing mixes to satisfy these needs. Conducting this analysis using current HROD students is likely to generate information and needs representative of the target market of students. Therefore, acquiring the perspectives and opinions of current graduate HROD

students regarding program brochures serves several purposes. First, it provides information about what features and presentations are attractive to the target market. Second, it will elicit information regarding exactly what prospective students need and want from a brochure. Presenting this information within the marketing framework of the five P's provides the opportunity for conference attendees to determine exactly what is necessary for their own program brochures.

Findings and Recommendations

Students provided the researchers with feedback and suggestions. This included highlighting those program materials that were perceived as positive examples as well as proposing methods for improving upon them. All marketing materials received from schools will be on display at the conference. Brochures and features demonstrating suggestions made by students will be presented. For specific recommendations, refer to Poster number 2.

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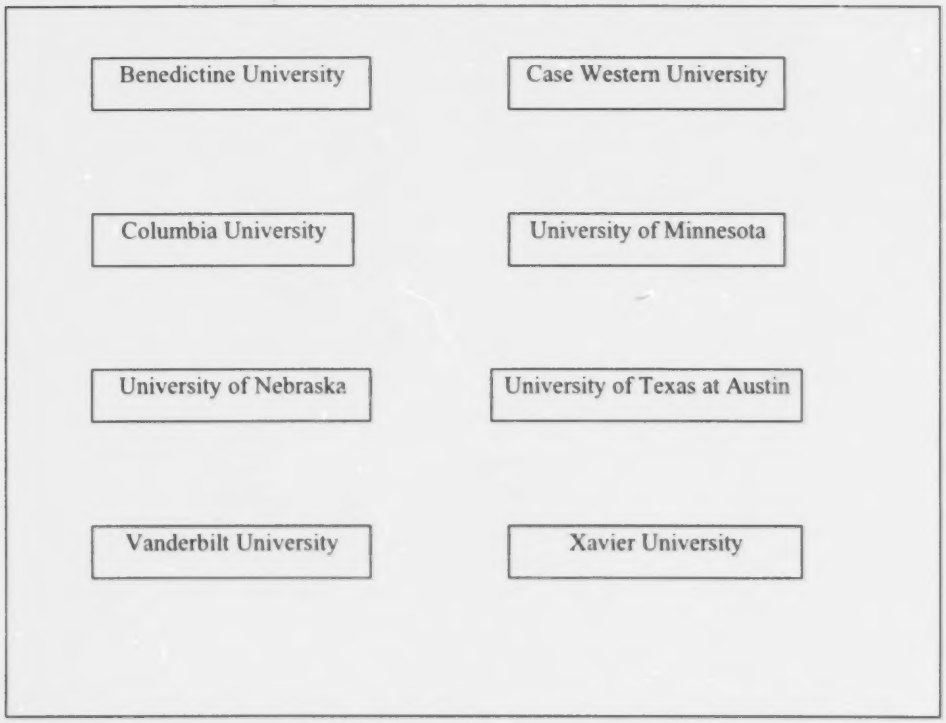
Poster 1
Display of brochures



Poster 2
What Students Want from HROD Program Brochures

People:	Include abundant information on faculty and students
	Represent diversity across ethnic groups
	Describe faculty interests and perspectives
Product:	List specific courses available
	Provide schedule of classes
	Provide specific information on what faculty has to offer students
	Demonstrate a variety of courses including both HRD and OD
Price:	Indicate the availability of graduate assistantships
	Present specific fee information
	Provide information regarding all financial support for students
Place:	Provide information on location of the university
	Indicate competitiveness of the program
Promotion:	Offer clear, concise and easy to read material
	Provide only program relevant material
	Use only current, up-to-date pictures and information
	Provide a page of frequently asked questions
	Organize materials/ include a table of contents
	Present an attractive and professional image - no photocopied pages or inserts
	Use colors effectively

Web-Assisted Foreign Study Model

James J. Kirk
Western Carolina University

This poster depicts a foreign study instructional delivery model that combines on-line marketing and delivery of international instruction with on-site visits in a foreign country. Various elements of the model are clustered into five delivery stages including; marketing, advance organizing, information gathering, information processing, and evaluation. Key elements of the model include; course materials (i.e., syllabi, assignments, resource links), an on-line orientation, on-line checklist, selected on and off-line readings, student questions and final exam, site visits, on-line and on-site discussion groups, and site visit reports.

This poster depicts a foreign study instructional delivery model that combines on-line marketing and delivery of international instruction with on-site visits in a foreign country. Various elements of the model are clustered into five delivery phases including; marketing, advance organizing, information gathering, information processing, and evaluation. Key elements of the model include; course materials (i.e., syllabi, assignments, resource links), an on-line orientation, on-line checklist, selected on and off-line readings, student questions and final exam, site visits, on-line and on-site discussion groups, and site visit reports.

Two recent phenomena have made the delivery of web-assisted foreign study both desirable and possible. They include the global economy (Jones, 1998; Smith, 1998) and the development of the World-Wide-Web (Moss & Townsend, 1997; Thornberry, 1998). The global economy ties the business interests, practices, and survival of US companies to markets in Europe, Asia, and Latin America. The advent of the World-Wide-Web makes it possible to communicate, do business, and teach individuals around the globe.

The Model

The following poster diagram depicts the five phases of the Web-Assisted Foreign Study Model. Elements of the model include Marketing, Advance Organizing, Information Gathering, Information Processing, and Evaluation. Each phase involves the use of the web to perform key functions. The term "phase" is used to indicate that it is not absolutely necessary to complete one step of the model prior to beginning the next step. The Marketing Phase involves contacting and getting promotional materials in the hands of potential students. Unless sufficient numbers of qualified participants can be recruited for a given course, the course may have to be canceled. The Advance Organizing stage involves helping students to get organized for travel abroad, gain an understanding of the course structure, and gain sufficient subject matter information to enable participants to engage in active learning activities when they arrive on-site in a foreign country. The Information Gathering and Information Process Phases involve gathering and gaining an in-depth understanding of the subject matter content. In practice these two phases overlap. However, the bulk of the Information Gathering Phase takes place abroad, whereas, the Information Processing Phase takes place after students have returned to the United States and have sufficient time to reflect upon their international experience. The Evaluation Phase involves assessing the knowledge and understanding students gained from their foreign study experience and getting feedback from students on the Web-Assisted Foreign Study Model. This information can be used by an instructor to make improvements in the Model.

Marketing

The added cost of travel, hotel, and meals makes foreign study courses more expensive than traditional classroom instruction. These added expenses often make it impossible for some students in a given academic program to participate in such educational offerings. Hence, instructors may need to market foreign study courses outside their own departments or universities. Otherwise, there may be an insufficient number of students to make the foreign study travel financially viable. Unfortunately the preparation, printing, and mailing of marketing materials outside

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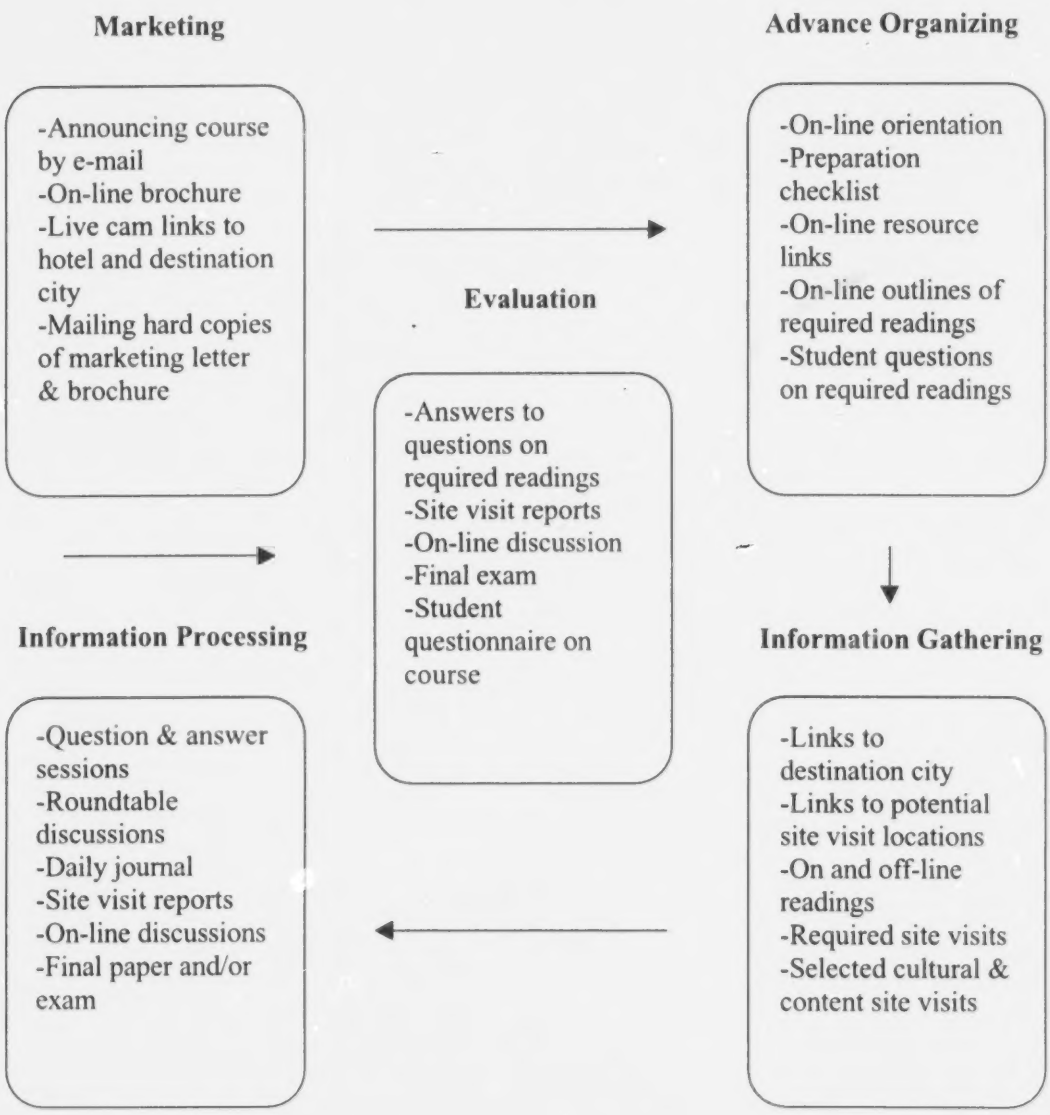
the host department can be rather costly. Costs may further increase when multiple mailings of promotional materials are needed and when the materials contain color pictures of the places to be visited.

Web-Assisted Foreign Study Model



The web can be a particularly useful and inexpensive marketing tool (Canzer, 1997). The Web-Assisted Foreign Study Model can help instructors overcome some of the marketing obstacles they may have encountered in the past. By e-mailing prospective students letters and brochures, one can greatly reduce printing and mailing costs. It is also possible to distribute greater amounts of information to larger numbers of individuals without an additional expense. Furthermore, e-mailing can be made more effective with the possibility of multiple mailings. Not only can pictures be included in the electronic mailings but links to live web cams can be included as well. Hence, prospective students can take a virtual tour of the hotel in which they will be staying or sites they will be visiting. They may even be able to download sound bites and short video clips. Such options may be helpful in influencing prospective students to sign up for a foreign study course. The end result is that more effective marketing materials can be sent more times to more individuals. If such mailings are directed toward a carefully selected audience, it can increase the number of students enrolled in a particular class. However, instructors should also be prepared to send out a selected number of course announcements and brochures the old fashioned way— snail mail. Not all prospective students can be reached via the web. Hard copies can also reinforce materials sent out electronically.

Advance Organizing

The second phase of the Web-Assisted Foreign Study Model is Advance Organizing. Generally speaking, advance organizers have been shown to facilitate learning across a variety of subjects (Lawton & Wanska, 1978: Lawton, 1979; Lenz, 1983; Mayer, 1979). Prior to engaging in a foreign study experience, students need to orient themselves to the course structure, the country being visited, and the subject matter of the course. Such cognitive and logistical organizing can be greatly enhanced by the web. For example, an on-line orientation can present information about securing a passport, baggage and special meal arrangements of the airlines being flown, time zone changes, weather conditions, money exchange rates, and cultural customs of the country being visited. An on-line checklist can help participants prepare for an international excursion in an orderly manner. Selected links can provide students background information, pictures, and maps showing the locations of places they will be visiting. Finally, on-line readings in a given subject matter can provide students the necessary background information to understand and discuss what they see while in another country. Advance on-line organizers can be used as the sole means of preparing students to study abroad or they can be a useful supplement to on-site orientation meetings and printed materials.

Information Gathering

The aim of any course is to help students gain information and understanding of a particular subject. With regard to foreign study courses, an added learning dimension is present. Learners are expected to gain an understanding of the culture in which the subject matter is to be learned or to which the subject matter pertains. For example, if students are going to the United Kingdom to learn about human resource management practices, they must also learn about British Society. This would include work systems, the law as it pertains to hiring and firing employees, health insurance, and private/government supported retirement systems.

The World-Wide-Web has been shown to be an effective tool for the gathering of information (Ashley, 1992; Ryder & graves, 1996). In the Information Gathering Phase students can access links to a variety of course related information. For example, they can listen to radio broadcasts over the web as well browse online newspaper, magazine, and library articles in the country to be visited. They can also access and read required on-line readings. Such readings can supplement other assigned reading from textbooks. Students can also access information about places they will be required to visit as well as places they will have the option to visit. Such information is often more current than what appears in print. It can be referred to after a site visit has been made to fill in information gaps that were not closed during the actual visit. E-mail links at such sites also afford students the opportunity to submit a question that they didn't think of during a site visit or have some point of confusion clarified. In addition, e-mail links to places visited provide students an affordable means of thanking their hosts for their time and expertise.

Information Processing

As most educators recognize, information is not knowledge or understanding. Knowledge and understanding comes with processing the newly acquired information (Boster & Hunter 91; Johnstone & Sleet, 1994; Parker, 1993). Processing new information often involves organizing/reorganizing the new information, interpreting the new information, integrating the new information into what is already known about the subject, applying the new information, and reflecting upon the information and it usage. Such processing can be facilitated by question and answer sessions during site visits and roundtable discussions among small groups of students at meal times. Once students have returned to the States, additional processing of the newly acquired information can take place through required participation in on-line discussions. Site visit reports, journals, final papers, and final exams that require students to concretely apply their newly acquired information can also help students increase their understanding of what they have learned.

Evaluation

Course evaluations typically involve assessing the results of an educational experience and making a judgment as to the worth of the outcomes. Such value judgments are then used to make program design and delivery decisions. An instructor may choose to discontinue a course or continue the course with some/no changes. Changes in the course are usually made with the intention of improving the results being measured. Measured results often involve student learning and student satisfaction with the learning experience (Rolph & Rolph, 1989).

The Web-assisted Foreign Study Model attempts to assess student knowledge at various points during the foreign study experience. Prior to going abroad the instructor posts questions covering the required readings. Answers to the questions provide an instructor some indication of how prepared students are to engage in meaningful and informed discussion once they arrive in the country in which they will be studying. Upon returning to the States, students participate in selected learning activities that provide the instructor additional information on the amount, accuracy, and depth of learning that has taken place. These include site visit reports, participation in on-line discussions, and a final paper or exam. Instructions for the site visit reports and group discussions are given on-line. Once completed, site visit reports are e-mailed to the instructor. The instructor evaluates all assignments and returns them to participants via e-mail. The instructor also actively participates in the on-line discussions. To assess student satisfaction with the course, a questionnaire is e-mailed to all participants. Students e-mail back to the instructor completed questionnaires. The results of the questionnaire are analyzed and used to revise the Web-assisted Foreign Study Model.

Conclusions

The global economy and the World-Wide-Web have made the delivery of web-assisted foreign study both desirable and possible. This poster session depicts a foreign study instructional delivery model that combines on-line marketing and delivery of international instruction with on-site visits in a foreign country. The model consists of five delivery phases including; marketing, advance organizing, information gathering, information processing, and evaluation. Key elements of the model include; course materials (i.e., syllabi, assignments, resource links), an on-line orientation, on-line checklist, selected on and off-line readings, student questions and final exam, site visits, on-line and on-site discussion groups, and site visit reports. The model can be easily adapted to a variety to subject matter content.

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Creating the Global Learning Organization (GLO)

Gary N. McLean
University of Minnesota

Amy S. Tolbert
ECCO (Effecting Creative Change in Organizations)

Ray C. Myers
MultiVersity Associates

Creating the Global Learning Organization (GLO) is an action research model to assist U.S.-based corporations in creating an organizational culture that is globally inclusive in theory and practice at all levels. It is based on the principles of Organization Development (OD) (including learning organizations), Human Resource Management, and change theory to move the corporation from an ethnocentric a geocentric corporate world view in all its business and people practices, policies, procedures, and technologies

Keywords: Globalization, International HRD, Organization Development.

With the fast-paced global changes facing the corporate sector and increased competition in the marketplace, globalization and diversity issues are ever more crucial to the survival and success of business organizations. Many U.S. businesses are just beginning to understand the importance of these global challenges. However, few have truly embraced globalization to the extent of creating a corporate-wide culture that is globally inclusive in practice and theory at all levels.

Problem Statement

Only 43% of service companies responding to a survey conducted by A.T. Kearney Executive Search indicated that they have a formal globalization/diversity process in place, while 32% indicated that they had no immediate plans to initiate such a process (Jarvis, 1997). The roots of corporate culture are so deeply embedded in many U.S.-based companies that promoting change on global issues is difficult and often resented or challenged by well-meaning employees.

The business research question is, How does a U S.-based business create an organizational culture that is globally inclusive in theory and practice at all levels? One of the greatest challenges for U.S. transnational corporations is shifting a long-time corporate paradigm from an ethnocentric worldview to a geocentric one (Heenan & Perlmutter, 1979) (see Figure 1).

Global Learning Organization

The Global Learning Organization (GLO) is a result of a proactive process used to transform corporate culture at all levels to a geocentric and globally-inclusive organization. This process and initiative address critical global diversity and change issues meant to attract and retain the best employees; gain a marketing advantage through enhancing customer service, innovation, and awareness of global and domestic diversity issues; increase employee creativity, quality, teamwork, and innovation; reduce costs associated with marginalization of employees and lower productivity; and obtain buy-in at all levels for corporate global diversity and change efforts.

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The first step in this transformation process is creating in the workforce an understanding of the need for change (Bennis, Benne, & Chin, 1985). This buy-in to the need to change must be based upon the concept of learner readiness while instilling in all functions and levels of the organization the pressing and strategic need to create new cultural roots and a globally-conscious mindset.

An attitudinal change typically precedes actual organizational change. A positive diversity-related attitude must be present prior to a behavior change because it demonstrates an individual's degree of readiness to behave in a certain manner toward co-workers or customers who are different (Henderson, 1994). Efforts to bring about real change without employee input and buy-in, however, can and often do result in strong resistance. Providing employees with the opportunity for input facilitates the attitudinal change that is the foundation for a geocentric focus.

Resistance is also minimized when the change process utilizes the principles of Organization Development (OD) (Burke, 1982; Rothwell, Sullivan, & McLean, 1995), Human Resource Management (HRM), and the Learning Organization (Kline & Saunders, 1993). The GLO model proposed in this paper should assist businesses in creating and sustaining structures, practices, policies, and values that will imbue the concepts of globalization and multiculturalism throughout the organization. It will also engage the business in a strategic planning process in creating and maintaining a globally-inclusive organizational culture (O'Hara-Devereaux & Johansen, 1994; Rhinesmith, 1993; Trompenaars, 1993).

While the model is intended to be general in scope, it is also designed to be modified for specific application to an individual business. Its focus is on process and the art of becoming. A systems approach with synergistic benefits is intended to tailor the model to needs of specific companies and even within different operations in different countries and cultures. No single OD intervention is intended. Rather, the model focuses on a strategic process that encompasses multiple interventions that may change over time as additional issues and problems emerge. Likewise, the model's attempt to create a geocentric organizational culture is not meant to fit each specific difference of the various cultural dimensions of different countries. The phrase, "think globally, act locally," is apt (Kanter, 1995). Each company must determine on a continuum what its desired business activity should be and adapt the model to its business plan (see Figure 2).

The concept of the learning organization was popularized by Senge (1990). Nevis, DeBella, and Gould (1995) described the learning organization as "an organization that has woven a continuous and enhanced capacity to learn, adapt and change into its culture. Its values, policies, practices, systems and structures support and accelerate learning for all employees" (p. 73). A long list of the characteristics of a learning organization are shown in Marquardt and Reynolds (1994), and includes, among others:

> ... Embraces change; encourages managers to be coaches, mentors, and facilitators of learning; has a culture of feedback and disclosure; has a holistic, systematic view of the organization and its systems, processes, and relationships; has shared organizationwide vision, purpose, and values; ... has systems for sharing learning and using it in the business; ... provides frequent opportunities to learn from experience; ... spreads trust throughout the organization; strives for continuous improvement; ...views the unexpected as an opportunity to learn. (p. 23)

These are the conditions that are essential for a global learning organization, as well as a domestic one. The assumption of the model is that the cyclical, continuous improvement principles of learning organizations, consistent with the values of the Action Research Model of Organization Development, are critical for the long-term success of an organization that is seeking to be global.

It is important to view the model presented here as a process model, not a blueprint for the creation of a geocentric organization. Use of the *process* outlined in the model will help each organization create its own blueprint; one that is fully customized to its specific needs. While no two blueprints will be identical, at the heart of each will be an organization that is truly globally inclusive. At its most basic, the model is intended to change the roots of organizational culture by affecting the very heart and emotional core of the corporation and its people. By placing emphasis on process and the affective dimensions of organizational culture, the model produces a transformation of the existing culture. It does require that the organization accept thought processes and paradigms that are consistent with Organization Development.

Model Description

The full model, displayed in Figures 3 and 4, targets the current organizational culture, including all systems, such as HR practices, business strategies, technology functions, marketing strategies, and R&D practices, and all employees. As all are targets of the change, all can also be agents of change.

Implementing culture change is an on-going process guided by strategies that are flexible and holistic that allow leadership to factor in external and internal dynamics that affect the marketplace and the business. This process approach may appear to be too amorphous for many bottom-line managers but, when founded securely upon sound theories and principles can provide a framework to allay such fears.

The following are tenets within which the globally inclusive GLO change process is conducted: *Create change buy-in and enrolment at all levels; Provide effective leadership modeling and articulation of global vision; Conduct culture audit, qualitative and quantitative, for designing OD interventions ; Create ownership of OD change interventions at all levels and functions; Provide extensive team-building and empowerment opportunities; Focus on personal and organizational work at the cognitive, affective, and behavioral levels; Design training and education processes around learner readiness; Build accountabilities for globalization into employee and executive performance; Link globalization efforts with all other corporate initiatives; Provide measurement for progress around OD change efforts;* and *Provide challenge and support for all employees.*

These tenets should be considered when implementing the GLO model. Implementation of concepts is dependent on the specific organization and a number of variables including: leadership commitment, other corporate initiatives in place, the level of globalization achieved to date, the organization's track record around diversity/globalization work, economic considerations, and organizational resources.

Implications for Human Resource Development

The OD and training implications of the GLO model have already been articulated in part. In addition, management development is key to the success of the GLO. To develop the competencies outlined, managers will need to have significant, perhaps life-changing, events. They need positive international and cross-cultural experiences, including worldwide travel. Executive and management coaches may help organizational leaders to develop, articulate, and implement the core tenets necessary for a GLO. Assignments to other parts of the world can be extremely beneficial, but only if the assignment is planful, the manager has an opportunity to reflect on the experience with others, and the organization plans for meaningful and productive repatriation. As specified in the tenets, however, the responsibility for globalization does not lie solely on the managers. Employees need similar positive experiences with international and cross-cultural situations.

Learning to work in cross-cultural, and often virtual, teams is also critical. Such training will include learning what makes teams more effective as well as team building. Modeling of appropriate team facilitation will be essential, and most teams will also require coaching, as team members develop appropriate team behaviors and learn team-based roles. Cross-cultural conflict management skills will also be needed and must be developed.

Some employees will have the opportunity for assignment in other parts of the world. HRD, and management, must take these assignments more seriously than has typically been the case. Employees and their families will need extensive pre-departure preparation, on-site support, and meaningful repatriation, including utilization of the newly developed globalization understandings and skills.

A culture of continuous improvement must exist for the transformation to move smoothly and for employees to feel that they have the freedom to suggest needed improvements in the globalization process and that they will be rewarded for such behavior. HRD will also need to teach both feedback seeking and feedback receiving skills among all employees. Communication skills, particularly within cross-cultural settings, will need to be developed.

The Research Task

As with any model, the research task addresses the validity, appropriateness, completeness, and practicality of implementing the model. Among other approaches that could be used, one approach would be the use of action research within an organizational case study (or multiple case studies) context. Specifically, the questions that need to be addressed by an organization that is attempting to develop a GLO are: What are the major problems encountered in attempting to implement the model? What are the barriers within the organization's culture that hinder implementation? What modifications are needed in the model (additions, omissions and changes)? Does the model work in certain types of organizations better than others, e.g., structure, size, industry, locations, pre-existing culture? Is it possible to change an organization that is ethnocentric to one that is geocentric or one that does not affirm globalization to one that does? What are the factors present within the culture that support these changes if they do occur?

Obviously, this is not a complete list of questions to be explored, nor will it be possible to answer all (or even many) of these questions through one research study. However, using the action research approach in combination with organizational case studies will allow insights related to these questions (and more) over a period of time. It will take a concerted research focus on behalf of those charged with implementing the changes to add to the theory and knowledge about the usefulness of this model and the many theoretical constructs that serve as its foundation.

Summary

The ultimate goal of any global OD change process is to infuse all members of an organization with such respect for globalization that an organizational culture is created in which all elements of diversity exist and are expressed in a natural and sustaining process. In effect, the process becomes second nature to the organization, and overt OD Global interventions are constantly being requested and implemented at all levels of the organization. The organization will have become a Global Learning Organization (GLO).

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- Center of business world at home
- Communication and directives slow and usually one-way
- Best ideas created at home
- Different perspectives tolerated
- Philosophy: Treat others as I would like to be treated

- "Center" shared throughout world
- 2-way communication and decision-making
- Fully inclusive creative thinking
- Different perspectives sought after and utilized
- Global marketing perspectives/strategies
- Philosophy: Treat others as they would like to be treated

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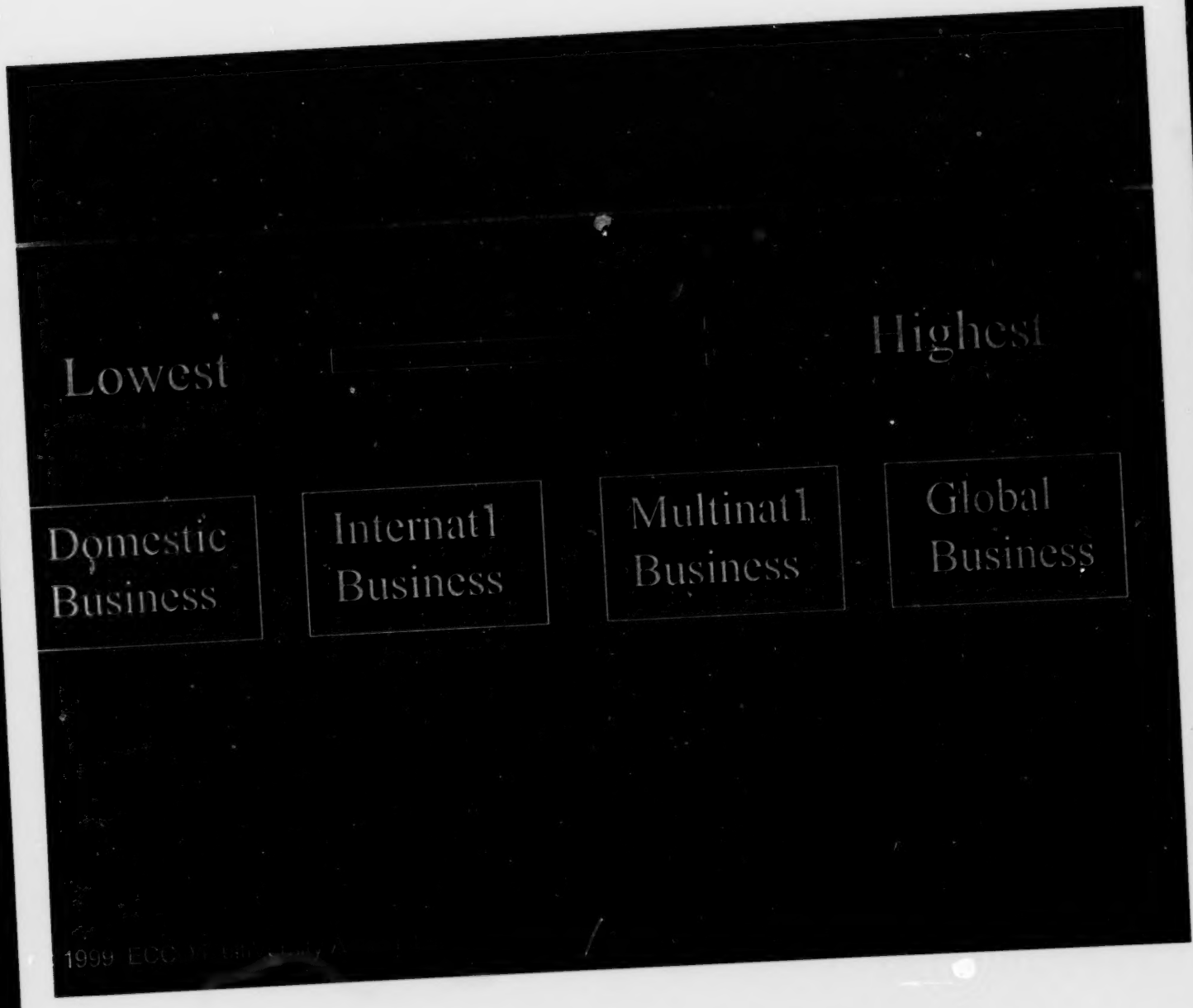

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igure 3 - Global Learning Organization (GLO) Model

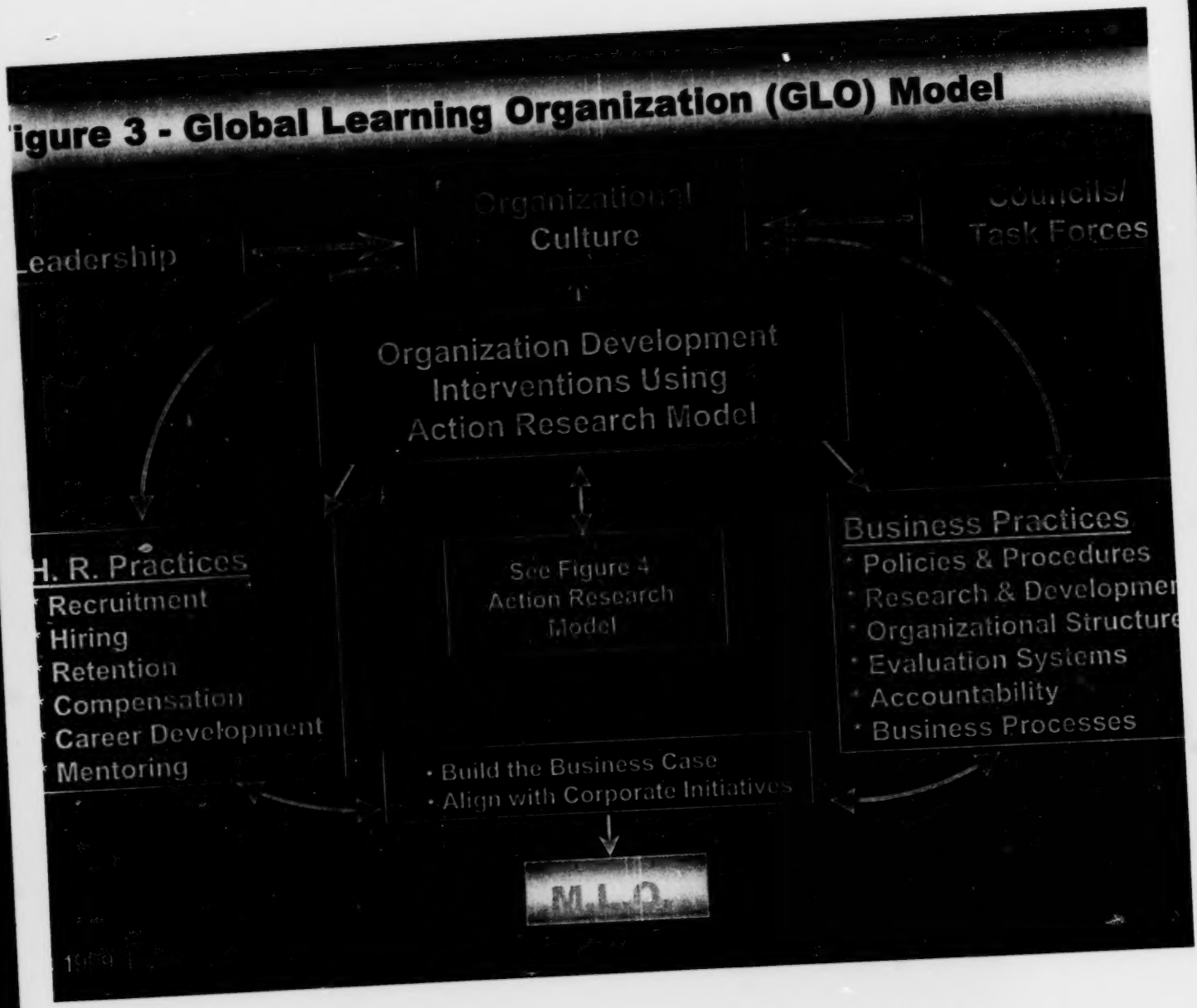

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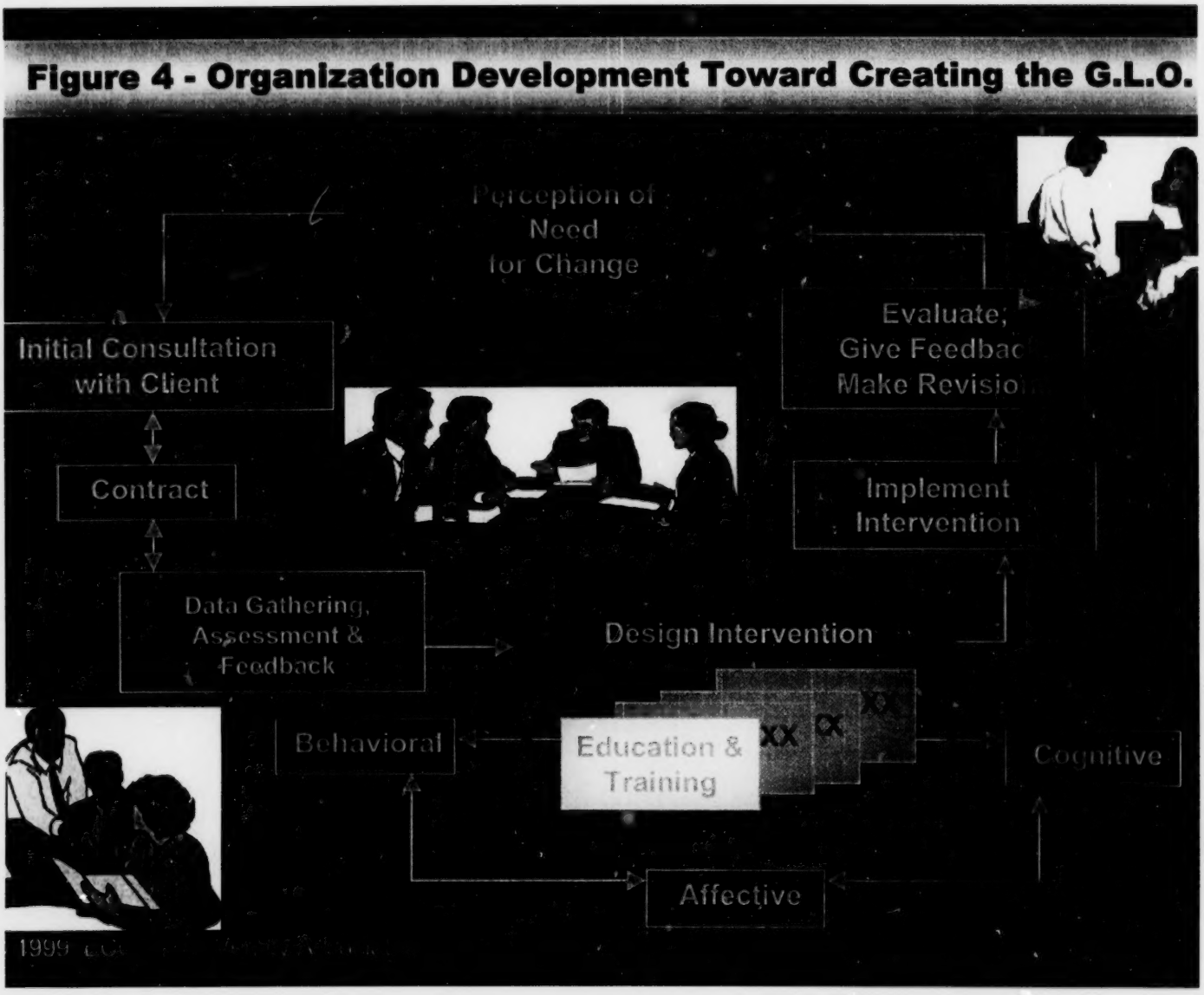
Figure 4 - Organization Development Toward Creating the G.L.O.



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Organizational Alignment Theory Updated: Poster Presentation

Steven W. Semler
Honeywell International/University of Minnesota

The article presents an overview of Semler's theory of organizational alignment, how and why it works, several theoretical propositions, a conceptual and diagnostic alignment model, and implications for practice. It accompanies the poster presentation.

Keywords: Organizational Alignment, Organizational Performance, Strategic HRD

Webster's dictionary defines alignment as "the proper positioning or state of adjustment of parts in relation to one another." In the organizational context, "alignment is the degree to which an organization's strategy, design, and culture are cooperating to achieve the same desired goals" (Semler, p. 23, 1997). It is a measurement of how "on target" the behavior of people and systems in the organization is with respect to the organizational vision. At its heart, alignment is how effective and efficient people are at getting their organization to where they want it to be.

For an organization to have strong alignment, it must be aligned internally and externally. It must have put the internal systems into proper balance and tied the strategy and culture to the same vision. Each job, process, and system must reinforce all others. The practices and attention of the organization's culture must be focused on the things that will make it unified and successful. Any duplication or conflict between parts of the organization must be intentional, useful, or both.

Anecdotes from business leaders, as well as related research, suggest that alignment is an important contributor to organizational performance, but not a guarantee (Galbraith, 1987; Labovitz & Rosansky, 1997). Alignment helps people know what to goals to pursue. It helps people accomplish their tasks efficiently. It engages their enthusiasm for the vision. It provides smoothly operating systems and processes in which to work. Having all of these things in alignment leads to excellent performance. Keeping them in alignment is also important, and challenging. Over time, an organization must maintain and adjust alignment, both internally and externally, in order to survive in a changing marketplace. Fluid environments require rapid responses to opportunities and threats. In such an environment, strong rigid alignment will only help an organization fail faster.

Alignment Theory

So how does alignment work? Nadler and Tushman's initial work in the early 1980's provided the groundwork for alignment through the concept of *congruence*. In their article on diagnosing organizational performance (1989), they described the organization as a system of parts that must be properly balanced for best performance overall. Other authors expanded upon this idea of congruence or agreement (Bennet, Fadil, & Greenwood, 1994; Galbraith, 1987). Additional work in developing alignment theory (Semler, 1997; 1998; 1999) added detailed explanations of relationships between variables and theoretical propositions that could be operationalized and tested through research. This work with alignment theory was the first to take a comprehensive view of alignment and explain how it worked to affect performance. According to this theory, alignment produces greater organizational performance by (a) focusing the discretionary effort of organizational members on the organization's vision and by (b) optimizing systems across the organization for successful attainment of strategic goals (Semler, 1999).

These two benefits of alignment give people in the organization the knowledge they need to guide their behavior, the capability or skill to perform, and the motivation to perform. They also give the organization's processes and systems the capability to focus energy on the right things with efficiency. Taken together, these things describe the key determinants of performance, as represented by the following formula:

Knowledge x Individual Capability x Motivation x System Capability = Performance
(Semler, p. 402, 1999, adapted from Campbell, McCloy, Oppler, & Sager, 1993).

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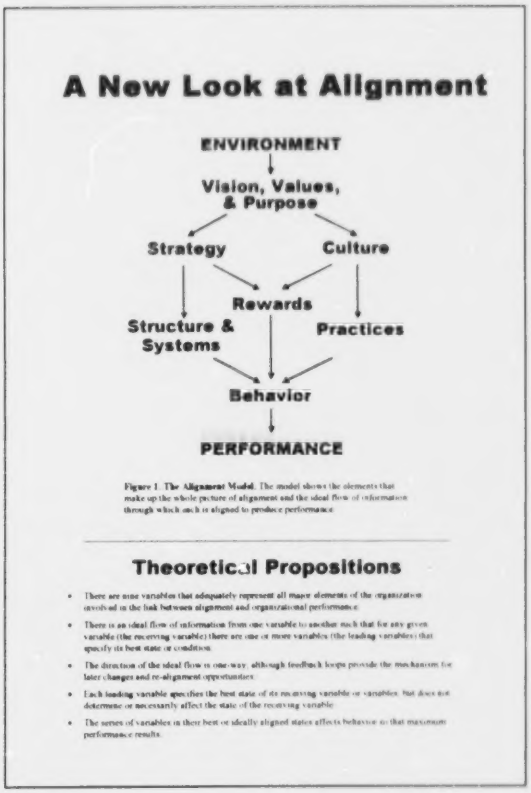
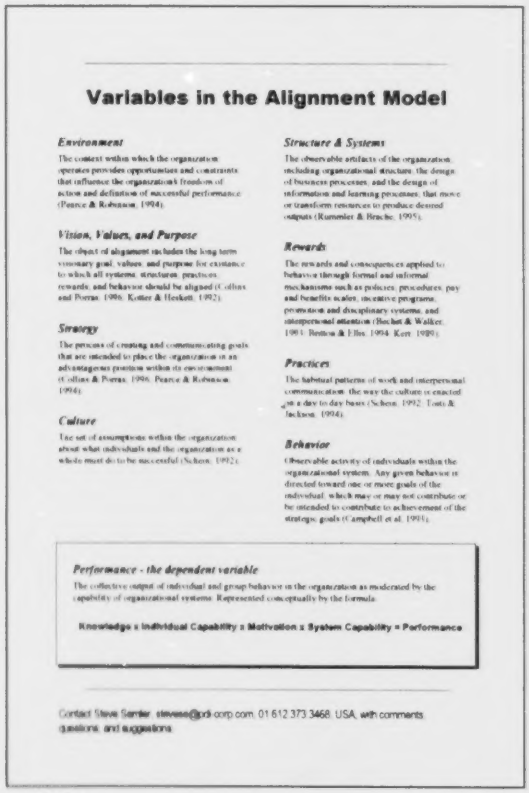
Distilled down to its essential principles, the theory offers several propositions about alignment:

- There are nine variables that adequately represent all major elements of the organization involved in the link between alignment and organizational performance.
- There is an ideal flow of information from one variable to another such that for any given variable (the receiving variable) there are one or more variables (the leading variables) that specify its best state or condition.
- The direction of the ideal flow is one-way, although feedback loops provide the mechanism for later changes and re-alignment opportunities.
- Each leading variable specifies the best state of its receiving variable or variables, but does not determine or necessarily affect the state of the receiving variable.
- The series of variables in their best or ideally aligned states affects behavior so that maximum performance results.


A New Look at Alignment
ENVIRONMENT
Vision, Values, & Purpose
Strategy
Culture
Rewards
Structure & Systems
Practices
Behavior
PERFORMANCE
Figure 1. The Alignment Model. The model shows the elements that make up the whole picture of alignment and the ideal flow of information through which each is aligned to produce performance.
Theoretical Propositions
There are nine variables that adequately represent all major elements of the organization involved in the link between alignment and organizational performance.
There is an ideal flow of information from one variable to another such that for any given variable (the receiving variable) there are one or more variables (the leading variables) that specify its best state or condition.
The direction of the ideal flow is one-way, although feedback loops provide the mechanism for later changes and re-alignment opportunities.
Each leading variable specifies the best state of its receiving variable or variables, but does not determine or necessarily affect the state of the receiving variable.
The series of variables in their best or ideally aligned states affects behavior so that maximum performance results.


Variables in the Alignment Model
Environment
The context within which the organization operates provides opportunities and constraints that influence the organization's freedom of action and definition of successful performance (Pearce & Robinson, 1994).
Vision, Values, and Purpose
The object of alignment includes the long term visionary goal, values, and purpose for existence to which all systems, structures, practices, rewards, and behavior should be aligned (Collins and Porras, 1996; Kotter & Heskett, 1992).
Strategy
The process of creating and communicating goals that are intended to place the organization in an advantageous position within its environment (Collins & Porras, 1996; Pearce & Robinson, 1994).
Culture
The set of assumptions within the organization about what individuals and the organization as a whole must do to be successful (Schein, 1992).
Structure & Systems
The observable artifacts of the organization, including organizational structure, the design of business processes, and the design of information and learning processes, that move or transform resources to produce desired outputs (Rummler & Brache, 1995).
Rewards
The rewards and consequences applied to behavior through formal and informal mechanisms such as policies, procedures, pay and benefits scales, incentive programs, promotion and disciplinary systems, and interpersonal attention (Becket & Walker, 1993; Beatson & Ellis, 1994; Kerr, 1989).
Practices
The habitual patterns of work and interpersonal communication: the way the culture is enacted on a day to day basis (Schein, 1992; Tosti & Jackson, 1994).
Behavior
Observable activity of individuals within the organizational system. Any given behavior is directed toward one or more goals of the individual, which may or may not contribute or be intended to contribute to achievement of the strategic goals (Campbell et al, 1993).
Performance - the dependent variable
The collective output of individual and group behavior in the organization as moderated by the capability of organizational systems. Represented conceptually by the formula:
Knowledge x Individual Capability x Motivation x System Capability = Performance
Contact Steve Semler, stevese@crl-corp.com, 01 612 373 3468, USA, with comments, questions, and suggestions.

Each of the nine variables in the alignment model refers to some element of the organizatio nal system. The variables in the model do not themselves represent alignment. Instead, alignment is the degree of agreement *between* variables in the model, but not the individual variables themselves. The nine major variables are:

- Environment.
- Vision, Values, and Purpose.
- Strategy.
- Culture.
- Structure & Systems.
- Rewards.
- Practices.
- Behavior.
- Performance.

Alignment theory refers to each linked pair of variables as a dimension of alignment (Semler, 1998). For each dimension, the *leading variable* is the one that ideally determines the state of the other, labeled the *receiving variable*. Although both variables are interdependent, the system characteristics of the leading variable give it

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more influence over the receiving variable. This plays itself out in the ease with which one variable can affect the other. For example, an organization is nested within its environment. It is easier to select a strategy that will meet the constraints of the customer and market environment than it is to change the environment itself to meet a pre-determined near-term strategy. According to Boulding and other systems theorists, this is a characteristic of a hierarchical system (Boulding, 1956). Thus, the environment is the leading variable and strategy is the receiving variable.

The interactions between leading and receiving variables manifest as specific organizational behaviors that people within the organization can observe. For example, within the *environment and strategy* dimension, one specific interaction might be the degree to which the strategic goals (receiving variable) reflect information about the organization's customers (leading variable). The operational definition of the alignment construct is the degree to which the receiving variable manifests information about the state of the leading variable.

The Effects of Alignment

Authors and researchers differ on the specific effects of organizational alignment, but generally agree that alignment unifies effort and reduces unintentional inefficiencies. Here are some specific effects of alignment suggested by theory and practice:

- Alignment increases discretionary effort directed toward strategic goals (Britton & Ellis, 1994; Semler, 1999).
- Alignment optimizes systems across the organization for attainment of the strategic goals (Labovitz & Rosansky, 1997; Semler, 1999).
- Alignment ensures compatibility and consistency of day-to-day activity and behavior with mission, strategy, and values (Kerr, 1989; Tosti & Jackson, 1994).
- Alignment reduces conflicts between different people and parts of the organization (Bennett, Fadil, & Greenwood, 1994).

Aligning the Organization

What can we do with this understanding of alignment? The three primary uses of the alignment model are organization design, performance diagnosis, and as a guide for action. This is where the alignment model earns its keep.

Design. In any organization design project, the alignment model can help leaders set up an effective design process. The model shows which things to consider first, as well as what elements should be aligned with each other. Designers should remember to consider both structural and cultural aspects of the organization as they do their work. By attending to both, organizational designers and leaders greatly increase their impact on the organization. They also enjoy a much greater likelihood that the members of the organization will embrace the design. As conditions change after the design is in place, leaders can use the model to diagnose the need for realignment to continually improve performance.

Diagnosis. Managers and practitioners can use the alignment model to compare ideal organizational states with actual conditions for each link in the model. The gaps between the ideal and reality will provide some points at which to target an intervention strategy. The diagnosis of alignment gives managers critical information about the effects of unintended conflict within their organizations. Knowing what issues to address and who to involve is often half the battle in organizational change efforts.

Acting to Align. The alignment model helps managers identify all of the elements to consider when trying to make any organization-wide change. Few lasting changes are possible without broad, reinforcing changes in all elements of the model. Correcting misalignment or realigning the organization to meet changing demands usually requires more than one basic type of intervention. For example, process redesign, training, and a change in executive priorities may be required to address misalignment of systems and practices. The people who design and lead these interventions have to make sure that each change supports the others and is driven by the business needs of the visionary goals. When interventions or changes are tied together this way, the organization enjoys much greater success than it would with separate fixes applied in isolation of one another.

Summary

Aligning the organization is a far-reaching and complex task. It requires leadership and influence skills, patience, and the ability to see the organization as a system. The implication of theory and experience is that greater alignment produces greater performance. This model explains how alignment works and how the different elements of the organization should be linked to produce optimum performance. Organizations that use this model to diagnose and improve alignment will be able to apply a thorough systems approach to their efforts. This will make it easier to engage people's energy and ideas to produce successful change. With good tools and a sound approach, managers can help people make changes that are exciting, motivating, and challenging for the future. These are the benefits of aligning the organization.

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